

REQUEST FOR PROPOSAL (RFP)
FOR A GUARANTEED ENERGY
SAVINGS CONTRACT

A. BACKGROUND AND PROJECT GOALS

A1. Notice

Pleasant Plains Community Unit School District #8 (District) is requesting proposals (RFP) from Qualified Providers to enter into a Guaranteed Energy Savings Contract (GESG) for work to be done at Pleasant Plains Middle School. The contract shall be pursuant to the requirements of Article 19b of the School Code of the State of Illinois.

The proposals may include: (a) the implementation of a facility audit, data collection, and other related analysis preliminary to the undertaking of Energy Conservation Measures; (b) the evaluation and recommendation of Energy Conservation Measures; (c) the implementation of one or more Energy Conservation Measures; and (d) the implementation of project monitoring and data collection to verify post-installation energy consumption and energy-related operating costs pursuant to 105 ILCS 5/19b.

Prior to or after proposals are submitted, the District reserves the right to terminate this project. The District may enter into a GESG with the Qualified Provider whose response to the RFP best meets the needs of the District. Only the Qualified Providers who meet all of the minimum requirements listed in this RFP will be considered by the District. The District is to be the sole judge of each proposal's value and merit and reserves the right to reject any and all proposals.

All Qualified Providers must attend a mandatory pre-proposal meeting, which will be held on November 15, 2017 at 10:00 am at Pleasant Plains Middle School (2455 N Farmingdale Road, Pleasant Plains, IL 62677). Any Qualified Provider looking to provide a response to the RFP must be present.

Proposals are due on or before 9:00 am on December 1, 2017 at the District Office, located at 315 W Church Street, Pleasant Plains, IL 62677. For more information, contact Bill Dargert at bdargert@ppcusd8.org. Any contact by the Qualified Provider with the Board of Education members for the District during the RFP process and consideration of responding firms without approval of the CFO, Bill Dargert, will be grounds for immediate disqualification of the Qualified Provider.

The District discloses that it has worked with ENTEC Services, Inc. in the preparation of this RFP.

A2. Minimum Requirements for Qualified Providers - The minimum requirements the successful Qualified Provider must meet are below.

1. Provide comprehensive energy services and innovative solutions for the District, which may include the installation of energy savings equipment. The specific nature of this equipment and material will be left up to the Qualified Provider and may be based upon the Qualified Providers understanding of the District's needs.
2. Provide building performance analytics to enable real-time, equipment level, measurement and verification. The building performance analytics must also provide equipment level key performance indicators to inform maintenance staff on repair and maintenance priorities.
3. Provide evidence that the firm is a "Qualified Provider" as defined in Section 19b-1.3 of the School Code (105 ILCS 5/19b-1.3).
4. Operate a branch location in Central Illinois that staffs full-time engineer(s), building automation system specialist(s), and mechanical service technician(s).
5. Demonstrate successful implementation of no less than 5 (five) energy savings projects in Central Illinois within the last 5 years.
6. All work completed under the contract for the project must be in compliance with all applicable federal, state and local laws, rules and regulations including the Prevailing Wage Act, all building codes and appropriate accreditation, certification and licensing standards.
7. The Qualified Provider must submit three (3) printed copies and one (1) electronic PDF copy on a USB flash drive of the proposal.

A3. Selection Process and Timing - The following process will be used to select the Qualified Provider.

RFP is Published and Posted on CDB Website	11/02/2017
Mandatory Pre-proposal Meeting	11/15/2017
Proposals Due	12/01/2017
Selection of Qualified Provider	12/18/2017
Notification of Selection to Provider	12/18/2017
Contract Approved by Board of Education	01/22/2018
Commencement of Work	05/24/2018
Completion of Work	08/12/2018

A4. Illinois Freedom of Information Act

Qualified Providers who submit a proposal should be aware that the District is subject to the Illinois Freedom of Information Act and any document provided may not be exempt from public disclosure under the Illinois Freedom of Information Act.

B. PROPOSAL CONTENT & FORMAT

The proposal shall be for the installation and implementation of Energy Conservation Measures as defined in Section 5/19b-1.1 of the School Code (105 ILCS 5/19b-1.1), for the improvement, repair, alteration, or betterment of any building or facility owned or operated by the District or any equipment, fixtures or furnishings to be added to or used in such building or facility that is designed to reduce energy consumption or operating costs. This RFP was issued to provide a competitive process through which the District will select a single Qualified Provider to perform the GESC. The GESC must comply with the Illinois School Code. Proposals must be submitted in the format outlined below and accomplish the Basic Scope of Work being sought by the district. The Basic Scope of Work is detailed in Section B.4.2 below.

B1. Table of Contents - Proposals shall include a table of contents indicating the section and page numbers of the requested information.

B2. Executive Overview – Proposals shall include an abstract stating the Qualified Provider's overview of the project. This abstract must include how the Company will impact the challenges faced by the District.

B3. Company Profile – Proposals shall include a section with the following information on the Qualified Provider.

1. Company qualifications.
2. A list of completed Energy Savings Projects executed in Central Illinois within the last 5 years. List the start dates and completion dates and whether the project was completed within budget. Also list the actual measured energy savings vs. the target energy savings and the method used for measurement and verification.
3. Addresses of Central Illinois office and corporate office locations.
4. Resumes of all key project personnel. Include the name of the engineer(s) providing the design engineering for the project.
5. A list of any litigation or arbitration your firm has been involved in over the past 5 years involving an owner. Provide a brief summary detailing the status and outcome of the dispute, the nature of the dispute and the venue of the dispute. The omission of any past litigation or arbitration will result in disqualification.

B4. Technical Approach – Proposals shall include a section that contains the following information about the Qualified Provider's technical approach to meet the District's energy efficiency, operating cost reduction, and comfort objectives.

1. **Current Conditions & Solutions:** Include an explanation of the facility's current conditions, and proposed solutions and improvements.
2. **Scope of Work:** Proposals must include the following Base Scope of Work to upgrade the current HVAC, lighting, and envelope systems. The objectives of these upgrades are to improve comfort, reduce energy and operational costs, and install on-site generation that results in a Net Zero Building. Qualified Providers may include any additional improvement items they recommend to the benefit of the District as part of this RFP.

- a. **HVAC Upgrade:** Upgrade Current HVAC System to provide heating and cooling in each zone independently. Replace existing controls with new DELTA Controls, or comparable fully BACnet compliant controls. Provide a building performance analytics engine to enable real-time, equipment level, measurement and verification. The building performance analytics must also provide equipment level key performance indicators to inform maintenance staff on repair and maintenance priorities.
 - b. **LED Lighting Upgrades:** Replace and/or retrofit existing interior and exterior light fixtures with new LED fixtures and install occupancy sensors that integrate with both the lighting control system and Building Automation System (BAS).
 - c. **Solar Photovoltaic Installation:** Install a new solar photovoltaic system to meet the Net Zero Energy goal.
3. **Engineering Approach:** Provide a detailed explanation of your firm's technical design process for this project. The explanation should include how the energy savings are to be calculated and which types of guarantees will be offered. The guarantee offers could include weather normalized utility bill analysis, actual energy use measurement, virtual energy use measurement, and stipulated savings. Also, provide the cost of each option. Indicate your willingness to provide a written guarantee that either the energy or operational cost savings, or both will meet or exceed, within 20 years, the costs of the energy conservation measures.
4. **Installation Approach:** Provide a detailed explanation of the process your firm intends to implement for the installation phase of the project. Include the approach, priorities, philosophies, timelines, change-orders, and commissioning.
5. **Commissioning Approach:** Provide a detailed explanation of the commissioning processes that you intend to utilize to commission the installed systems for optimal performance.
6. **Equipment Selection:** Provide a detailed explanation of the process your firm will use to obtain the equipment to be used on the project.
7. **Contractor Selection:** Provide a detailed explanation of the process your firm will use to select and choose the contractors performing any work that will not be self-performed.
8. **Performance Assurance Agreement:** Provide a detailed explanation of the performance assurance processes that your firm will use to ensure the installed systems continue to operate at peak performance at the completion of the installation and through the term of the contract. Additionally, describe any warranties provided by your firm for the work completed.
9. **Supplementary Information:** Additional information about your firm's technical approach to the proposed project may be included in the proposal.
10. **Documentation:** For any work where you will be providing costs, provide the following documentation for the scope of work being proposed.
 - a. **Equipment and Material Table:** Provide a table detailing, where applicable, manufacturer, type, model, size, and quantity of all equipment provided.
 - b. **Engineering Schematic Design Drawings of Proposed Improvements** must be provided (Failure to provide drawings may result in a disqualification of the Qualified Provider.)

B5. Financial Approach and Guarantee – Proposals shall contain a section that includes the financial investment and savings components of the proposed work.

1. **Investment:** Provide a detailed explanation of the process that you intend to utilize to obtain the most valuable investment for the District. Explain why this approach results in the lowest long-term cost of ownership for the District. Include the investment cost and guaranteed energy savings amount for all proposed improvements.
2. **Energy Savings:** Explain how you intend to maximize energy savings with the initial installation of energy conservation measures and how you intend to support the district in continuously commissioning the system to maintain the initial energy savings.
3. **Energy Savings Results:**
 - a. Provide an example of an annual energy savings report. Describe in detail how the report will be generated.
 - b. Shortfalls - The Qualified Provider must include a summary of the reported annual savings for completed projects. Any projects that did not meet the annual energy guarantee must be listed with an explanation for the shortfall.
 - c. Guaranteed Energy Savings Statute - The Qualified Provider must include a summary explaining how they will ensure compliance with the Guaranteed Energy Savings Statute in 105 ILCS 5/19b-1 et seq.
 - d. Project Funding: The District will determine project funding after selection of the Qualified Provider.

B6. Implementation Plan – Proposals must include an implementation plan with a timeline describing the process your firm intends to use to execute the project and meet the deadlines set forth in these specifications.

1. Provide a detailed explanation of your firm's project management approach for this guaranteed energy saving project.
2. Provide a project execution timetable with a staffing plan, identifying key project management personnel. It is the expectation of the District that the staff assigned to this project will remain on the project until it is completed. Confirm that this is part of the implementation plan.
3. Confirm that all work completed under this Contract will be in compliance with all applicable federal, state and local laws, rules and regulations including all building codes and appropriate accreditation, certification and licensing standards.
4. Confirm that the work will be in accordance with sound engineering and safety practices, be installed in a workmanlike manner and be in compliance with all District regulations relative to the premises.
5. Confirm that the Qualified Provider and its subcontractors will be responsible for obtaining any and all required governmental permits, consents and authorizations, and for payment of any and all state and city required taxes and fees which result from this Contract.

C. PROPOSAL EVALUATION

Each response will be evaluated by a review committee, which will evaluate the responses on merit, completeness, and the ability of the Qualified Provider to meet the needs, the best interests, and the stated goals and objectives of the District. The evaluation process may include verification of presented information and clarification as requested. The District may reject any proposal that does NOT meet the minimum criteria described in this RFP. The District will use the following criteria when evaluating the proposals:

1. The ability of the Qualified Provider's team to successfully implement the project.
2. The qualifications of the people responsible for implementing the proposed GESC. This includes in-house engineers, project managers, building automation and mechanical service technicians responsible for the design, implementation, commissioning, and ongoing support of the project.
3. References of the Qualified Provider for successfully implementing energy savings projects and providing proven energy savings.
4. The Qualified Provider's Technical Approach. Preference will be given to proposals that include a detailed and sound technical approach to meeting the District's objectives.
5. Consideration of the financial investment and the long-term net economic impact of the proposed scope.
6. The Qualified Providers Performance Guarantees and the value offered by the energy savings guarantee and methodology of the proposed measurement and verification plan.
7. Preference will be given to written guarantees that are based on actual results versus stipulated savings.